GROUP MANAGEMENT SKILLS FOR BETTER COMMUNITY HEALTH

PARTICIPANT HANDBOOK

KDHE-CHIPr TRAINING

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PURPOSES OF TODAY'S TRAINING

The primary purpose of today's training is to enhance our group management skills so that, in turn, we can better assist communities as they address their top health concerns.

Along the way, we will also:

Review the basic nature of community coalitions;

Identify critical success factors for coalition success;

Create solutions to common problems that keep coalitions from being as successful as they would like

Explore with some simple tools for use in coalition enhancement;

Develop some specific actions steps that we can take to be more effective in working with and/or being part of a community health coalition; and,

Have some fun!

Let's be:

Informal

Interactive

Questioning

Respectful

Advance Agenda

1. Welcome And Introductions

2. Purposes Of The Training

3. Agenda For The Day

4. CHIPr Model

5. Beginning With The End In Mind – What Are Community Health Coalitions?

6. The Cause And The Vision

7. People and Relationships

8. Working Together Effectively

9. Keeping On Track

10. Now What?

INTRODUCTIONS

Who Is This Guy?

Who Am I?

- My name is:

- I was born in:

- What my role in CHIPr is:

- What I most like to do to relax is:

- The best thing that happened to me in the last six months is:

- The thing I most value in life is:

THE COMMUNITY HEALTH INTERVENTION PROCESS

MOBILIZE

ORGANIZE

PLAN

IMPLEMENT

EVALUATE

And along the way:

ENGAGE STAKEHOLDERS

What are community coalitions – really?

A coalition is:

- A somewhat un-natural alliance of people committed to a common purpose.

- They get things done that otherwise would not happen.

- They are **not** meetings.

- They are **not** easy.

"If you have seen one coalition, you have seen one coalition!" Dr. Shoshana Sofaer

Each coalition has its own unique blend of talent, skills, character, and personality depending on who is sitting around the table.

In the end, coalitions are about causes and vision. Whether they are successful or not depends on the people who participate, the quality of their relationships, and how well they can work together.

What is it that community health coalitions generally want – what are they really hoping to achieve? Big picture thinking needed here!

GENERAL RULES FOR BRAINSTORMING

- There are no bad ideas.
- Record everything people say as they said it.
- Be pleasant to each other – do not criticize other people's contributions.
- Pass if you have nothing to add when it comes your turn.
- Purpose is to generate ideas even if they seem far-fetched, will prioritize or scale down at a later time.

Participants Responses:

Change

Establish norms

Awareness

Increase safety

Build relationships – want the community to get behind them.

Common good

Strength of the group

Communication – send a message to community

Maximizing resources

YOU SAID that the most important assets that coalitions contribute to community health are:

Education of the public

Bringing the public together on a specific issue

Problem identification and information

Collaboration on solutions

Sharing of ideas, resources and concerns

Understanding of the community and its talents, people and resources

Community connections

A vested interest in seeing things improve

A broader, diverse perspective, skills and solutions

Enthusiasm

Assistance to the community

Resources
Motivation
Strength in numbers
Community engagement / involvement
Each person's expertise
Ability to advocacy

What does this list represent?
Resources
Establish Goals
Explain reason or purpose for the coalition to the community
- *Checklist against which you can assess how well your coalition functions*
- *This gives you ideas on changes that need to be made within the coalition.*

If you have decision makers at the table you have to allow them to make decisions so they feel they are productive. If not they will send someone farther down in the organization.

What does this list represent?

#1 THE CAUSE AND THE VISION

Three important questions:

What is the extent of the community health problem? – assessment

How well prepared is the community to address it? – assets/liabilities

What do we want to change? – planning

WHAT IS THE EXTENT OF THE COMMUNITY HEALTH PROBLEM?
Assessment

What key elements does this include?

Responses from brain storming –
What is the community?
Who is affected?
What are the trends?
What is the frequency?
Causation?
What has been tried before?
Funding/Resources?
Location – worse in some places than others
Does somebody have the data?
What if we don't do this?
What is the impact to the community?
What opposing views are held in the community?
What are the side effects of this problem?

All of this information can be put together in a fact sheet to share with the community. This will help the members explain the problem and the vision.

Has this been done formally by the coalition?

Has it been written down? – short, simple, lay language
KISS- Keep It Simple Simon

Can coalition members uniformly cite the key points?

Coalition members decide the 3 key points by brainstorming and then identify them by putting a sticky paper under the three they feel most important – Prioritize.

Have you told the public? – loudly, often, consistently
Be creative

What have you learned from the public response?
Monitor and evaluate the response.
When someone offers suggestions they are recruits

HOW WELL PREPARED IS THE COMMUNITY TO ADDRESS THE HEALTH PROBLEM?

SWOT? – strengths, weaknesses, opportunities, threats.

Assets/ Liabilities Assessment

How well prepared (generally) are Kansas communities to engage in community health improvement?

ASSETS:

- Coalitions consist of people who are affected by the problems and are volunteers on the ground who can make a difference.
- The mission of the group is clear.
- The problem is clearly identified.
- Community members have powerful stories and testimonials to tell that convey the importance of the problem and what can be done about it. (Iowa Department of Public Health – Faces of Cancer in Iowa)
- There are resources internal to the community and external to it that can be brought to bear on the problem.
- Some people are able to contribute work time to the effort.

- The issues being addressed are honorable ones that people sincerely want to address.

LIABILITIES:

- There is simply not enough time to do everything, especially when the work requires volunteer effort and there are many community needs.
- Everyone's too busy.
- It is easy to get people to plan; harder to get them to do the work outlined in the plan.
- Lots of people don't like planning.
- A bias of the organization you work for won't let you work on that particular problem.

Planning Rules
Define parameters for planning – set specific time for the planning.
Don't get into definition debates
Develop a process for moving on, planning will end at some point.
How many hours are we going to spend on planning?

Sample of setting up a planning schedule (the work you have done prior to the planning process will move it along.)

    2 hours on definition of problem
    2 hours what can we do (brainstorming)
    2 hours – prioritize – those brainstorming ideas.
    2 hours look at the draft plan.
    This is for short term planning. Identify the things you can do this year, then identify the items you can work on next year.

To do long term planning assign members of the group to do research outside of the meetings, then bring that information back to the group and

discuss the important issues at the meetings. Someone has to be responsible for driving the process.

In our community health efforts have we:

Taken full advantage of our assets?

Taken action to mitigate our liabilities?

WHAT DO WE WANT TO CHANGE?

Communities face lots of issues – coalitions can only do so much. Even within a specific issue of importance to a community, there are many things that probably need to be done; more than can probably be accomplished in any period of time. This means that communities must make choices. Good planning can help us make those choices effectively.

The essence of good planning is to:

1. Clearly define the problem.

2. Define a vision for how things could be different.

3. Put all the options for addressing the problem on the table.

4. Make hard choices about what to do.

5. Define action steps and responsibilities.

6. Be accountable.

CAUTION: Keep in mind that planning is a means to an end – not the end itself!

A GENERAL STRATEGIC PLANNING FRAMEWORK

What things will be different in the next 5-10 years if we spend our time in strategic planning now?
(vision / goals)

↕

What things in the current environment are going to help us achieve those things?
(assets)

What things in our current environment are going to work against our achieving those things?
(liabilities)

↕

What are the major things we can do to take advantage of our assets and/or overcome our liabilities?
(objectives / strategies)

↕

Among all the things we might do, which ones should we do immediately and which one later?
(priorities)

↕

What actions must we take to accomplish our priorities and if we take them, what specific outcomes do we expect to obtain?
(workplans and accountability)

↕

What additional capacities do we need to take the actions?
(resources)

SOME SELECTED 'LESSONS LEARNED' FROM STRATEGIC PLANNING

- Most people need to know that their participation in planning will lead to some meaningful action. There is always a level of skepticism. It helps to identify who the plan is for, where the plan goes after it's done, what will be done with it and 'who decides'.

- The leaders of the planning process should have a common idea of where the planning process is going and how and when the work will get done. Participants usually need to be reminded from time to time where they are in the process.

- It helps to have some clear decision rules articulated in advance that can be applied when the participants cannot reach consensus on an important matter.

- The more people that are involved in the planning effort, the greater the commitment to the final product and the greater the challenges of managing the process. The trick is to balance the efficiency of the process against the need for buy-in and support.

- Participants like to see the results of their work unfold throughout the process (iterative plan production).

- More and more, people are looking for a clear, concise and hard-hitting plan as the product.

- There is often concern about where the accountability for implementing a plan lies and how progress will be monitored (frequency and reporting). These should be addressed directly in the plan itself.

- Nothing hangs up a planning process more than 'definitional' debates, planning jargon, and 'writing by committee'.

- People need to see the plan being used to believe it's meaningful.

A Few Words About SMART Objectives

Specific

    Measurable

        Attainable

            Reasonable

                Time-bound

Sample SMART objective: Decrease number of motor vehicle accident injuries by 50% in county x over the next two years.

How realistic is this? Members of the coalition will see this a doable, others will want to reduce the amount. A quick and easy way to come up with what is attainable - Have everyone take a post it note and put down what they feel is attainable then put them up on the board. There will be a cluster around one number. Simple and easy process to come up with an obtainable number.

DECISION RULE MODELS

Consensus: The whole group has to agree

Democratic Majority: Most groups function by this method.

Super-Majority: 75-85% of the group. May work best. Several coalitions are going with this model.

Minority Reports: If 80% rule – the 20% are given the opportunity to write a report why they don't support the 80%.

PRIORITY SETTING MODELS

Normative Model: Allow individual organizations to work on items at the bottom of the list with a few individuals to allow everyone to feel as though they are valued members of the coalition. Doting is a quick way to come up with the top prioritizes. Use the ¼ rule, get ¼ of the list.

Forced choice: List all of the options, then compare them one to the other; which one works A or B, then A or C this was not Tom's model, but one that came from the group.

Volunteer Model: A person is still representing an organization, they will have their own commitments and ideas for the coalition.

Combination of the two:

PEOPLE AND RELATIONSHIPS

IT'S ALL ABOUT RELATIONSHIPS!!!!

Coalitions are PEOPLE. Not matter how else they describe themselves, coalition members are people. They

NEEDS

EXPECTATIONS

DREAMS

COMPETING PRIORITIES

These must be understood, accounted for and managed by the coalition if the relationship is to work.

What Makes A Meaningful Relationship Work?

Respect
Reciprocal
Friendly
Trust
Values
Common Goals
Good listener
Fun- enjoy spending time with others
Personality traits
skills, talents
willingness to share success
ground rules
good communication

This is a list you can use to assess where the coalition is. Are all of these things going on in the coalition?

FROM THE COALITION'S PERSPECTIVE

What do we expect from our members? – examples

Commitment – read, follow through, work

Participation – come to meetings, feedback, ideas

Support – recruit, attend events, advocating with decision makers on our issues, talking up issues

Honesty – speak up if you have an issue

Don't come up with problems without providing solutions.

Commitment to do the work – tell them up front the expectations

We almost never write this stuff down or tell people this when we are recruiting.

It is helpful to have someone who is paying attention to the relationships within the group.

What benefits do members get from being part of our coalitions? – examples

Visibility for your contribution or organization

Network

The community will be a better place to live

There may be resources to help address problems that affect you, your neighborhood or your organization

Sense of self-work – giving back to your community

Accomplishments

Build some skills

Learning process

Are these written down?

Does anyone discuss these with prospective or new members? We should discuss these with new recruits

What happens if someone says they can't do something the coalition expects? Allow them to do what ever it is they can to support the work of the coalition even if they can't attend meetings, work behind the scenes to accomplish the work. Provide input, put their talents and energy to work as they are able.

FROM THE MEMBER'S PERSPECTIVE

What kinds of things are you willing to do for this coalition?

Volunteer time

Organize meetings

Participate in events/activities
Proofreading
Research issues/topics
Provide technical expertise
Find resources/support
Keep the distribution/mailing list up to date
Work on public awareness
Donate items

What kind of things are you capable of doing for this coalition but would rather not?

Work on a major event with limited volunteers or resources.
Solicit funds from individuals
Take minutes during meetings
Public speaking
Write PSA's
Plan meetings

What kinds of things are absolutely not willing to do for this coalition?
Anything that conflicts with my job (e.g. lobbying)
Meet at night
Be the coalition chair, treasurer or other official
Mislead the community
Do everything on my own

What must I have from this coalition if I am to be a member?
Need to participate as a decision maker
Feel valued
Need to do something, be active
Use my time wisely
Fulfill something that is internal to you
Need to see progress
Need to see visibility for their organization

WORKING TOGETHER EFFECTIVELY

Learning some lessons
We can still get things done even with conflict
Never be a co-president
People will give, but not necessarily money
Respect different ways of giving to the effort (some give a lot, some give less, some give money, some give time – it all helps)
People really like feeling they have given something back
Community pride increases as we work – we can go from worst to first.
Taking someone out of their comfort zone-ended up being a positive experience.

Critical factors for coalition success

Barriers to coalition success

Problem solving

Models of state / local interaction

LEARNING SOME LESSONS

Once upon a time, there was a PTA Co-President and he was surrounded by wild-eyed activists……………..

Lessons he should have learned:

CRITICAL FACTORS FOR COALITION SUCCESS
(other than those we already have discussed)

Be clear on where the power in a coalition is – who makes decisions?

> Everyone decides
> Smaller group – how do I get in?
> Newbies and fossils -There has to be an underlying value that everybody's ideas are valuable.

Great communication – everyone has the <u>opportunity</u> to know what is happening. Be aware that different people within the coalition have different needs for information – provide the opportunity for communication.

Remind people regularly where you are going – the vision thing – and 'you are here'. **Most people can only hold the vision for 2 – 3 months. Remind the group of the vision, where we are in the process, the outcomes are working towards.**

Be ready for the hard questions – more later.

Be good at conflict resolution – more later.

Make progress – tell someone.

Celebrate. [Talk about a need for skill development!] Public health is very poor about celebrating because we keep look back at the problem and we haven't solved or eliminated it yet.

BE READY FOR THE HARD QUESTIONS

If a community health issue is really important and hasn't been adequately addressed in the past, there are usually some hard questions that the public, media

and/or decision makers (and maybe even some coalition members or potential coalition members) are going to ask.

Most importantly, if the hard questions aren't answered well, your cause may lose or fail to garner the support it needs. People tend to shy away from organizations that don't seem to be able to answer the hard questions well.

There are techniques used by the commercial world that health groups can apply to anticipate hard questions and be ready to effectively address them should they arise.

These are sometimes called issues management or strategic communications. The important elements of a good issues management capacity include:

- A 'main' message about what your coalition is trying to accomplish.
    1. **Don't want to dwell on the topic they are bringing up – when attacked by the media**
    2. **Come up with the message before the question comes up.**
    3. **Be prepared before the hard questions come up.**

- A list of 'hard' questions.
    1. **Make a list of nightmare questions**
    2. **Group comes up with the main message**
    3. **We have to deal with the question then go to your main message. If you don't answer the question it will be asked over and over again.**

- A 1-2 sentence response to each hard question.
    1. **If we only have a 10 – 15 second sound bite, what would it sound like.**

- Ready responses to potential follow-on questions.
    1. **Anticipate the follow-on questions. Answer the question and get back to the main message. Leave people with the main message.**

2. At events have press kits ready to give them so they can build the story around the information.

- The ability to <u>transition</u> from the 'hard' question to the main message.
  1. Practice the transition

- Responsibilities for responding to hard questions are clearly defined.
  1. Everyone should know the facts and the answers but only a few should be the ones in front of the mic.

- Everyone can sing effectively from the same songbook - **Everyone of us has interactions outside of the coalition that can help to benefit the work of the coalition.**

Examples from your experience:

CONFLICT RESOLUTION

Recommended reading the book "Getting to Yes"

Conflict resolution is not as easy as just applying decision rules, although they can help a lot!

Conflict is usually more intense than simple disagreement over an idea or an approach.

Conflict evokes emotion and all that that entails.

Left unresolved, conflict festers and comes out in ways later that usually distract us significantly from what we are really trying to achieve.

If you have 1 or 2 organizations that have conflict, those 2 need to step out. The whole coalition doesn't need to deal with it.

Basic rules of conflict resolution include:

- State directly, factually and unemotionally what the conflict is about; do not dance around the issue.

- Agree to stay focused on the problem.

- Avoid personal references to the other parties in the conflict. **NO NAME CALLING.**

- Together, brainstorm out all the things that the parties **_agree_** on with regard to the issue. Often this alone leads the parties to a solution.
  - Publicly act on the things you agree on.

- If no solution emerges, agree to disagree on the issue and create ground rules for how to address the issue in the public eye.

- If the conflict involves only some of the coalition partners, suggest that those parties get together to address thier issues with each other rather than involving everyone – unless the result includes a change in policy for the whole coalition.

- Caution members who are not part of the dispute to not take sides but rather to suggest the parties sit down and resolve their issues. **NO THREE-WAY CONVERSATIONS.**
  We don't have conversations about someone outside of the room.

- Sometimes an outsider or a 'friendly' insider can be a useful mediator in such discussions.

- Make sure your coalition's conflict resolution procedures are understood by everyone in advance of the discussion.

Example:

"TEXAS PLAYS FAR BETTER FOOTBALL THAN KANSAS EVER WILL."

BARRIERS TO COALITION SUCCESS

<u>YOU SAID</u> the following barriers keep coalitions from being successful:

>Time (for meetings, etc.)
>Money
>Enough volunteers
>Turf
>Negative outside influence ('experts' trying to tell the coalition what's best)
>Bureaucracy requirements
>Personality conflicts
>Participation in meetings
>Organization of the plan
>Moving from planning to action
>Reaching people of greatest need
>Burn out (esp. if the population to draw from is small)
>Members who are competitors
>Lack of planning and evaluation skills
>It takes time to accomplish goals
>
>Others:
>
>What does this list represent?

This list can act as a checklist to see how the coalition is doing. Assessment tool for the coalition.

GROUP PROBLEM SOLVING

Working on sensitive topics:
Where is the real source of opposition?
Go to the opposition and work with them to see what they would be comfortable with.
Ask the coalition what will we do when we lose the battle.
Make the pretending it doesn't happen the issue that you are going to tackle.

Recruiting new members / partners:
- Feels bringing in 4 – 5 very targeted members that can do the work of the coalition.
- If someone is recommended to the group have the leadership and the person recommending the person meet with that individual together.

Obtaining community buy-in:
Provide community with information on what the coalition is doing through a progress report.
If there is a barrier of denial the first issue you need to deal with is to over come the barrier before you can implement any interventions.

Finding financial resources:
Internet has several philanthropic sites
CDC funding
Need list of major foundations, that provide funds and what they are willing to fund.
Partnering with other organizations that funding opportunities available.
Have conversations about funding
Clear idea of the problem
What are we going to do with the problem?
How much is it going to cost to make a dent in the problem?
Have a scenario for if a funder can't give you the full amount you want, know what you can do for the amount they are willing to give you.
Be aware of where the money is in the community that is willing to be a benefactor for the project.

Motivating coalitions to take action and not rely solely on the leaders:

Leadership transition:

Maintaining enthusiasm of members:

Ways to meet without meeting:
- E-mail
- phone calls
- Conference calls – set time, set agenda –stick to the agenda, use the mute button, make sure the topics are subjective.
- Do you have to meet? Can things be developed through faxes and phone calls to gather information and then when the actual development takes place then you can have a meeting.
- Fax
- Set time frames for when projects need to be done.
- Do brain storming through advance surveys
- Video conferencing – clear agenda
- Meet with members individually – 1:1 conversations

Others?

MODELS OF STATE AND LOCAL INTERACTION

Some comments – facilitation is used in different ways.

What are the pros and cons of each of the following models:

1. Community leads the effort with state staff as 'advisors' for technical assistance and training.

2. Community leads the effort with state staff providing logistical and other support functions.

3. State staff participates as an active member of the community coalition leadership – shared leadership.

4. State staff takes the lead responsibility for the community effort.

If your coalition is not where you feel it needs to be you need to have the conversations and work toward getting it to where it needs to get there. It will take time. Coalitions will take the path of least resistance, if someone is getting paid to do the work, then the coalition will expect it. The group needs to talk about what facilitator means to them, put options on the table for groups to choose from if they do not come up with options themselves get the group to talk about pros and cons of the options.

KEEPING ON TRACK

Coalitions need to know that they are making progress towards their goals. Periodic progress reviews provide a means for members and the public to see what the group has accomplished and where it is going. These can take a variety for forms, including:

- External Evaluation – a group of outsiders review the work of the coalition and objective indicators of its progress on goals. – objective; credible; expensive; intrusive; outsiders may not understand the community context or what is feasible and practical.

Tom likes this idea
- Report Cards – the coalition members periodically review available data against the goals and objectives of the plan and prepare a report card in which they rate the performance of the coalition. This also forms the basis for modifying their plans. Results are provided to the community as well as coalition members. – not entirely objective; clearly incorporates community input in the process; shows accountability; provides for public visibility.

- Coalition Operations Assessment – coalition members rate the manner in which the coalition operates and suggest changes for alteration. The results are shared internally and lead to changes in operating policies and procedures. A sample assessment is attached. Members fill the assessment out individually and then collectively discuss the results.

Coalition Self-Assessment

Sample Questions

1. What is the best thing our coalition did this year?

2. What is the biggest mistake our coalition made this past year?

3. What two things do we do really well in our coalition?

4. What two things do we seem to do poorly in our coalition?

5. If you could change one thing in your coalition in the coming year, what would it be?

6. If you could do one new thing in our coalition this year, what would that be?

7. What one thing could I do in this coming year to increase my value to the coalition?

8. Do you feel the coalition values your contribution?

TELL YOUR STORY!

If you only have the problem statement – tell it!
If you have a plan – tell it!
If you have activities – tell it!

CELEBRATE YOUR SUCCESSES!

A FINAL WORD (OR SO)

- **Ghandi reminds us that real power for change is not in the size of the group working on it, but in their having an indomitable will.**

- **Coalitions are not always easy.**

- **Dysfunction may not mean a lack of success.**

- **Address the hard things that arise in a forthright manner as they happen.**

- **Keep your eye on the ball!**

- **BEST WISHES FOR SUCCESS AND MAY GOD BLESS YOU ALL IN THE TERRIBLY IMPORTANT WORK YOU DO!**

A Happy Coalition is not what is important!